Project Case Study: HomelyLifetime

Project theme: Improving the survey, design and installation process

Project lead:

Evergreen Energy Ltd.

Partners:

N/A

Contact:

jamie.elliot@homelyenergy.com

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£465,991

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What were the objectives of the project?

The Homely Lifetime project, funded under the Heat Pump Ready programme, aimed to enhance the installation and aftercare experience for both installers and homeowners. The project had two primary objectives:

1. Improve heat pump maintenance and servicing efficiency for installers through remote monitoring and diagnostics.

2. Improve the onboarding and long-term user experience of homeowners using heat pumps.

What activities were funded?:

The project funded several key activities, building on the existing Homely platform:

- **User research and industry engagement:** Conducting interviews and surveys with homeowners and installers to identify pain points in installation, servicing, and onboarding.
- **Developing Homely Connect:** Building a brand-agnostic service portal for remote monitoring and diagnostics, integrating error codes from different heat pump manufacturers, and enabling remote parameter adjustments.

- **Proactive alert system:** Designing alerts to detect issues before they cause system failures, such as node battery depletion and incorrect flow temperature settings.

What did the project achieve?:

The Homely Lifetime project successfully enhanced the existing Homely platform with new features, including remote monitoring, diagnostics, and proactive alerts. These improvements allow installers to monitor and diagnose heat pumps remotely, reducing the need for on-site visits by ~30% and providing better aftercare for customers. Additionally, a proactive alert system has been integrated to notify installers of potential performance and efficiency issues as they arise. The project also developed a detailed onboarding process to educate customers on the best parameters for their heat pump, increasing engagement and reducing user frustration.

Project Objective 1: Using remote monitoring and diagnostics to make heat pump servicing and maintenance easier for installers

Why is this important?:

Remote monitoring and diagnostics are crucial for ensuring the correct operation of heat pumps, increasing installer accountability, and building consumer trust. They allow installers to review and adjust heat pump parameters without the cost or disruption of attending the site, improving efficiency and customer satisfaction.

What activities were funded?:

To support installers and customers in improving heat pump performance and efficiency through remote monitoring and diagnostics, the following activities were funded through the project:

- Developing Homely Connect, a centralised installer dashboard for remote diagnostics.
- Installer feedback research.
- Creating an error code interpretation system, simplifying troubleshooting across multiple heat pump brands.
- Enabling remote parameter adjustments, allowing for quick system configuration changes.
- Creating a suite of proactive alerts to detect system inefficiencies before failures occur.
- Developing an automated system check at installation, ensuring correct heat pump configurations.

What were the project findings and did the project achieve this objective?:

The project successfully developed and tested the Homely Connect minimum viable product (MVP) with 175 units, surpassing the initial goal of 50. User analysis showed installers frequently and effectively use the system. Over 30 in-depth interviews and a survey with 60+ installers and homeowners

highlighted the platform's usability and effectiveness. At Installer Show 2024, 15 installers shared positive experiences during live demonstrations.

Installers appreciated the ability to view multiple installations from different manufacturers on one platform, saving time and providing a comprehensive overview. The Homely platform reduced unnecessary visits, improved efficiency, and increased customer satisfaction, demonstrating its value. The platform has enabled the visualisation of error codes, which allows installers to identify issues such as short-cycling due to closed TRVs, system performance issues, and in one case the it improved the understanding of the system to the extent that an under-sized heat pump was discovered and it allowed the situation to be resolved for the customer and the installer's design processes to be improved. The proactive alerts feature was well-received, which notifies installers of issues like failing to reach target temperatures or short-cycling. Initial trials showed a ~30% reduction in emergency visits, and installers continued to add new hubs to the platform, indicating its success. The proactive alerts will be expanded to include hot water system issues and airflow inefficiencies.

Project objective 3: Improve the onboarding and long-term user experience of homeowners using heat pumps.

Why is this important?

Most UK homeowners are unfamiliar with heat pump technology. This unfamiliarity with how heat pumps work and how best to configure heat pump settings can lead to suboptimal efficiency in operation and higher energy costs for customers.

Homely set out to deliver a better customer onboarding experience in order to address these issues, increase user satisfaction and reduce installer callbacks. Homely aims to educate customers on how best to configure their heat pump at the point of commissioning and send helpful reminders before the heating season (early October) to improve efficiency and comfort. This could also reduce the need for installer callbacks, reduce running costs, and improve customer satisfaction.

What activities were funded?

To help support customers via improved educational material, Homely undertook the following actions as part of its Heat Pump Ready project:

- Conducting user research to identify friction points in onboarding.
- Developing incremental onboarding improvements in the Homely app:
    - Removing the requirement for upfront electricity tariff selection.
    - Introducing default heating schedules, reducing user setup time.
    - Providing dynamic prompts instead of requiring immediate input during onboarding.

What were the project findings and did the project achieve this objective?

The Homely team identified the first two weeks of heat pump operation as critical for adaptation. To optimise heat pump use, Homely adopted a progressive information delivery strategy, providing small,

digestible updates and automated in-app updates. This approach included pre-emptive FAQs and troubleshooting tips.

Homely's multi-channel approach during the first two months ensured users received guidance through in-app info cards, push notifications, and targeted emails. This strategy helped users be aware of the benefits of using Homely, reducing frustration and increasing engagement. Long-term success requires continuous engagement, so future work will provide seasonal guidance and advanced energy-saving tips. The new onboarding features positively influenced user satisfaction and engagement, improving heat pump optimisation and user experience.

Summary:

What impact could this have on accelerating the heat pump rollout?:

The HomelyLifetime project has demonstrated that the platform has the potential to significantly advance the rollout of heat pumps in the UK by enhancing remote monitoring, diagnostics, and customer satisfaction. Positive feedback from installers highlights the platform's ability to provide comprehensive oversight, reduce site visit costs, and improve customer support. This efficiency allows skilled engineers to focus on new installations, which is crucial for meeting Net Zero targets. Additionally, the platform builds consumer trust by adding accountability to installers, offering proactive alerts, and reducing customer costs and disruptions. These factors are essential for accelerating heat pump adoption in the UK.

What next?

Following the successful completion of the HomelyLifetime project, the team is planning to expand the user trials to retrieve continued feedback from the Homely Connect beta programme. The proactive alerts features will continue to be added to and refined based on user feedback and expanded beyond heating system alerts to include hot water system failures.

The pro-features developed through HomelyLifetime will be expanded, and the commercialisation options around the pro-features available to installers will continue to be refined in the coming months. This additional work will ultimately build towards a full market launch expected in Q4 2025, with continuing refinements as the proposition develops.

Where to find out more

More information on the HomelyLifetime project can be found on the Homely website as well as on the central Heat Pump Ready website. Please see links below:

Homely: The smart controller of choice designed for heat pumps

Heat Pump Ready - Heat Pump Development & Deployment (NZIP)

Name of key contact:

Jamie Elliot

Email of key contact:

Jamie.elliot@homelyenergy.com